

Montana

▼
TOURISM AND FILM
MARKETING PLAN

1994 — 1995

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FOREWORD



Tourism is an old, old business in Montana. It began long before Lewis and Clark ventured through our state in the early 1800s. As we are all aware, tourism in Montana has been going great over the past half decade. Last year was another record year for

visitation and visitor expenditures. All indications are that this kind of activity will continue into the foreseeable future.

A number of factors have contributed to Montana's tourism industry success. We are able to offer a quality product. This product includes not only the state's wonderful natural beauty, but the service orientation of Montana's tourism businesses along with the quality, sincerity, and candor of the Montana people. Add to this the successful business and government partnership involved in the promotion and development of Montana's tourism industry, and you complete the formula that has provided such positive benefits for Montanans and Montana's economy.

As we look to the future, tourism remains an important piece of the overall economic puzzle for our state. Our economy can no longer rely on one or two ingredients to produce prosperity. We need a wide variety of economic options, a mix that plays to, and on, the diversity and strengths of Montana's individual regions and communities. Clearly, tourism is part of that mix.

Once again, I would like to congratulate the Montana Department of Commerce and the Montana tourism industry for having the foresight to be planning for the future, as this document does, and not simply relying on the successes of the past for direction. Good luck and best wishes for the coming years.

A handwritten signature in dark ink, reading "Marc Racicot".

Marc Racicot
Governor



Over the last two years it has been gratifying to see the strategic plan developed by the Commerce Department's Travel Montana program and the state's tourism industry begin to achieve its goals. The industry and our agency put a lot of time and effort into this plan, and

that investment is paying off.

The plan focused our efforts on spreading the benefits of tourism to Montana's less traveled areas. Last year, state lodging tax receipts showed the strongest growth in Montana's rural areas, particularly in eastern Montana. That's a big plus for the state and the communities involved.

The plan promoted helping communities decide on developing or expanding the role for tourism in their local economy. Three communities are currently involved in this process and their work will result in a blueprint for other Montana communities to follow.

The plan encouraged efforts to foster increased cooperation among agencies and organizations involved in tourism promotion and services. Today, there is more communication regarding tourism and how we can do things better than ever before.

While the results envisioned by our planning are coming into sight, we still have challenges. Mitigating the real and perceived impacts of tourism along with protecting what makes Montana so attractive to its residents and visitors are just two tests we face. Continued teamwork between government and the private sector to address these and other issues is essential. The Montana Commerce Department is committed to being a part of the team that answers these questions. We look forward to working with everyone interested in what's best for Montanans and the Montana economy.

A handwritten signature in dark ink, reading "Jon Noel".

Jon Noel, Director
Montana Department of Commerce

INTRODUCTION



Our *Tourism and Film Marketing Plan* outlines the strategies and efforts to be implemented by the Montana Department of Commerce's Travel Montana staff in fiscal year 1995 (July 1994-June 1995). The plan was developed with the advice and approval of the Governor's Tourism Advisory Council. The purpose of this publication is to help Montanans and other interested citizens understand the goals and orientation of the state's tourism development programs.

As a basic premise, Travel Montana's mission is to promote and develop tourism in Montana for the economic benefit of all our citizens. In partnership with the Montana tourism industry, we have developed a five-year strategic plan designed to enhance tourism's role in building a strong Montana economy while protecting the essence of what makes

Montana such a special place to live and visit: our rich natural, cultural, and historic resources along with the warmth and sincerity of the Montana people.

In this year's plan, we have increased our activities in a number of areas. These are activities we believe will assist in the continued diversity and development of a positive tourism product in Montana. Programs that will receive greater emphasis in fiscal year 1995 will be:

- Film Industry Promotion and Marketing
- Overseas Marketing
- Group Travel and Convention Marketing
- Superhost
- Visitor Information Centers
- Education and Development
- Publicity

Ours is an exciting challenge. We look forward to the continued strong partnership with the private sector and Montana's many tourism organizations. Working together as a team we will be successful in ensuring that tourism remains a healthy, integral part of Montana's economic framework.

A handwritten signature in dark ink, reading "Matthew T. Cohn". The signature is fluid and cursive, with a large, stylized "C" at the end.

Matthew Cohn, Director
Travel Montana

▼ T O U R I S M A D V I S O R Y C O U N C I L

The Montana Tourism Advisory Council (TAC) was created by statute in July of 1987, as a result of the inception of the Montana lodging tax. The Council is composed of no fewer than 12 members from Montana's private-sector travel industry, with representation from each of Montana's six tourism regions and a representative from among the Indian tribal governments. Members of the Council are appointed by the governor and serve staggered three-year terms, subject to replacement at the discretion of the governor.

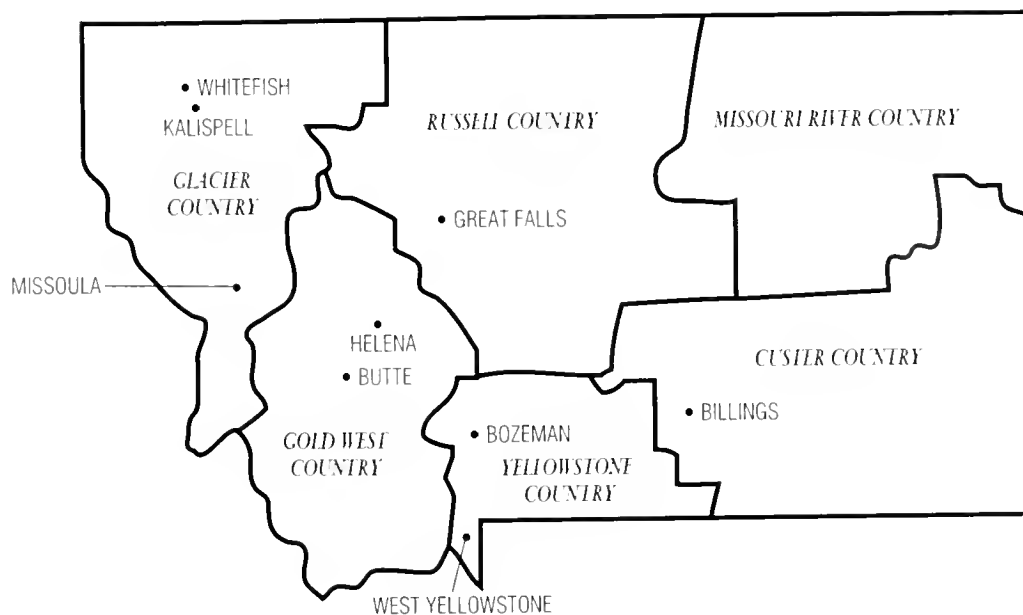
A chairperson and a vice chairperson are elected, or re-elected, by the Council during the first meeting of each fiscal year, which starts on July 1. Members must have served on the Council for at least one year to be eligible for election to these posts. The Council meets three times annually and/or as needed.

THE DUTIES OF THE COUNCIL ARE AS FOLLOWS:

- Advise the governor on matters which relate to travel and tourism in Montana.
- Set policies and guide the efforts of Travel Montana, Department of Commerce.
- Oversee distribution of funds and set guidelines for nonprofit regional tourism corporations and non-profit convention and visitors bureaus.
- Prescribe allowable administrative expenses for which accommodations tax proceeds may be used by nonprofit regional tourism corporations and non-profit convention and visitors bureaus.
- Direct the university system's travel research and approve all projects prior to their being undertaken.

CERTIFIED TOURISM ORGANIZATIONS

Twenty-five percent of Montana's state tourism budget is legislatively allocated to 15 certified organizations. These organizations are private, nonprofit corporations that market specific regions and cities within the state. Under the direction and guidance of the Tourism Advisory Council, these organizations submit annual marketing plans which seek to both increase visitation and visitors' lengths of stay. Marketing plans for each of the tourism organizations are on file at Travel Montana.



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▼ T O U R I S M F U N D I N G

Our state's dramatic tourism growth since 1988 is directly tied to the Montana Legislature's creation, in 1987, of a dedicated accommodations tax. Montana funds its travel and tourism marketing programs solely from this source, with no dollars from the general fund. The existence of this funding, and the valuable promotional efforts it has allowed, are essential to maintaining and increasing tourism growth into the future, with widespread economic benefits to all Montanans.

Projected Lodging Tax Revenues FY 95	\$8,145,975
State Parks Operations/Maintenance - 6.5%	\$529,488
Department of Revenue - 3% Tax collection & return of tax paid by state employees	\$244,379
University System - 2.5% Tourism and Recreation Research	\$203,649
Historical Society - 1% Historical Sites and Signage	\$81,460
Available for Department of Commerce - 87% Regions/CVBs and Travel Montana	\$7,086,998

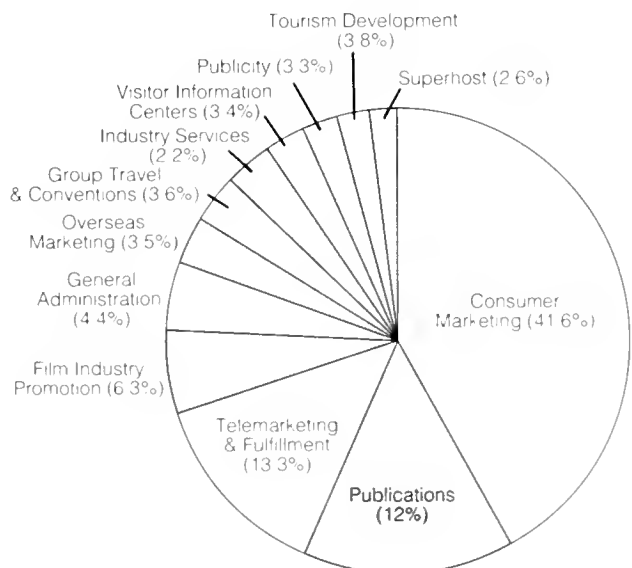
Department of Commerce Projected FY 95 Budget

Regions/CVBs 25%	\$1,771,750
Travel Montana 75%	\$5,315,249

Travel Montana Projected FY 95 Budget

Funds available from Accommodations Tax	\$5,315,249
Income from ad sales, co-op projects training, etc	\$558,000
Legislatively mandated support for international trade program	\$167,248
Total Funds Available	\$5,706,001

How Travel Montana Funds Are Spent



TRAVEL MONTANA OVERVIEW

DIRECTOR

Matthew T. Cohn
Director of Tourism



Matthew is responsible for directing all activities of Travel Montana, and promoting Montana as a year-round travel destination and leads the state's tourism development,

multidimensional marketing, and film industry promotion efforts. Matthew ensures the tourism perspective is considered in matters of policy at the state level. He works on regular basis with tourism regions and organizations, chambers, the State Legislature, U.S. Congressional members, local governments and the press to create a positive environment for tourism and film location growth in Montana.

ADMINISTRATION

Janice Wannebo
Administrative Officer



Providing direct support to the Travel Director, Janice assists with coordination of Travel Montana's many activities and ensures the smooth flow of information. During the

Director's absence, she expedites all contacts and correspondence from members of the public, tourism industry and other government agencies. Janice serves as liaison with staff on special projects, and is responsible for personnel matters, private-sector contracts, the research library and presentation material. She handles varied special projects, compiles travel data, and responds to information requests.

Becky Thomas
Administrative Assistant



Providing administrative support for staff, primarily the Industry Services program, Becky performs diverse duties from research and data collection to assistance with publication

layout and design. She maintains accommodations tax revenue reports and records on financial and program compliance by tourism organizations. Becky is also responsible for maintaining database operations for Travel Montana's industry mailing list, used to keep members informed of events, co-op programs and the activities of Travel Montana. She establishes guidelines for and schedules display booths and banners for exhibiting, and assists in the development of seminars, workshops and conferences.

CONSUMER MARKETING

Georgia Maclean
Consumer Marketing Manager



Each season presents new challenges and opportunities for Georgia, who oversees Travel Montana's domestic and Canadian consumer advertising. She is involved in developing plans and budgets for spring/summer, fall and winter marketing, in-state marketing, and Invite-A-Friend programs, and coordinates seasonal campaigns to fulfill those plans within budget. Georgia is also responsible for determining the effectiveness of Travel Montana's advertising campaigns, and makes

recommendations for change based on market results. Her job includes overseeing the contracted advertising agency, presenting campaigns to the Tourism Advisory Council, and organizing cooperative advertising with other states, visitors bureaus and private-sector organizations. She also coordinates Travel Montana's presence at consumer travel shows in key markets, complementing consumer advertising.

OVERSEAS MARKETING

Pam Gosink
Overseas Marketing Manager



Creating a demand for what Montana has to offer is a primary goal of Pam's activities in Japan, Taiwan, the United Kingdom, France and Germany. She encourages overseas tour decision makers to include Montana in their programs, and assists in the planning of group and FIT individual travel in Montana. Persuading key travel trade representatives and the news media to take familiarization trips to experience Montana tourism opportunities first-

hand is also an important part of her job. By attending trade shows and trade missions, Pam and Montana suppliers have the opportunity to meet potential overseas buyers and create new avenues for media contact. In her marketing efforts, Pam also develops and distributes promotional materials in foreign languages, and develops innovative promotional opportunities.

GROUP TRAVEL CONVENTIONS

MaryEtta Sodja
Group Travel Manager



Marketing Montana to group tour operators and convention planners has MaryEtta planning itineraries, providing travel counseling,

attending targeted trade shows and performing other duties to encourage groups to visit Montana and stay longer. MaryEtta develops and distributes the state's Group Tour Planning Guide and manages regular mailings of *Montana Magazine* and a Montana calendar to key tour operators. Her work also includes organizing familiarization trips for group tour operators and downhill skiing tours for ski group leaders. MaryEtta is also responsible for the development and implementation of Montana's convention promotion, including a direct mail campaign, *Meeting Planner's Guide* and the Invite-A-Convention program.

PUBLICATIONS

Donnie Sexton
Publications Manager



Directing production of Travel Montana's numerous publications has Donnie gathering facts, writing, editing, selecting photos, scheduling and

much more. She is responsible for the *Montana Winter Guide*, *Fishing Guide*, *Vacation Guide*, *Highway Map*, *Travel Planner* and Summer and Winter Calendars. She coordinates production of the *Movie Location Guide*, *Group Tour Guide*, *Meeting Planner's Guide* and other printed material such as business cards, letterhead and newsletters. Working with a publishing company, Donnie directs creative design; oversees layout, proofing, and printing; makes photo selections; and negotiates rights with photographers. As time allows, she is in the field taking images for use in the Travel Montana stock photo library and publications.

PUBLICATIONS PUBLICITY

Marlee Iverson
Publications / Publicity Assistant



Corresponding regularly with over 2,000 hotels, motels, resorts and recreational facilities, Marlee compiles information vital to the accuracy of Montana's

travel literature. She also serves as photo and video librarian—lending slides, videos and photos to tourism groups, publications and others with an interest in what Montana has to offer. Her research work is a valuable part of Travel Montana's efforts to provide national and international journalists and program producers with the information they need regarding Montana's travel opportunities. Marlee is also responsible for gathering information for the summer and winter calendars.

PUBLICITY

Victor Bjornberg
Publicity Coordinator



Soliciting news coverage of Montana and responding to journalists interested in covering Montana as a tourism destination are central to

Victor's many responsibilities. Along with distributing a quarterly newsletter and releasing ideas for potential feature articles, Victor serves as a resource for writers, news media and others. He works with the state's tourism regions in developing story ideas, gathering information and assisting writers who visit the state. Victor also coordinates writer familiarization trips and handles instate media relations for Travel Montana.

TOURISM DEVELOPMENT

Clint Blackwood
Tourism Development Coordinator



Working to assure internal support for tourism in Montana, Clint interacts with various state and federal agencies and private-sector interests related to tourism

infrastructure development. He coordinates and facilitates cooperative marketing efforts between organizations as diverse as the Department of Fish, Wildlife & Parks, U.S. Forest Service and Department of Transportation. As Tourism Development Coordinator, Clint is involved in long-range strategic planning, tourism assessment, interagency and public relations negotiations on behalf of Travel Montana.

DEVELOPMENT SUPERHOST

Tina Hash
Tourism Development / Superhost Assistant



Tina performs administrative support duties for the Tourism Development and Superhost programs. Tina also provides staff support for the various programs and projects in

which the Tourism Development Program interacts and researches technical and financial assistance resources. She assists with promoting the Superhost program and certification of communities and businesses. Tina also coordinates data entry involved with an interactive computer system of visitor information.

FILM OFFICE

Lonie Stimac
Film Office Manager



Promoting Montana as an ideal place to make a movie or shoot a commercial is the job of the Film Office under Lonie's direction. She manages the office budget, personnel

matters, and is responsible for location scouting with film companies making it as convenient as possible for them to shoot in the state. She assures that the Film Office staff is available to assist or make local contacts once filming begins, and also works with Montana businesses and individuals to foster a productive working relationship with film crews. Lonie acts as Travel Montana's liaison with other state and federal agencies regarding the needs of production companies. As a marketer, she attends trade shows and film festivals and oversees advertising targeted to the film industry.

Bill Kuney
Film Location Coordinator



Responding to the needs of film production companies interested in Montana, Bill scouts the state, shoots hundreds of location photos and compiles location

information. He works to offer several options to fit the storyboards or scripts of people seeking locations for feature films, documentaries, commercials and print ads. Bill assembles customized photo presentations using the Film Office's extensive file of location photos—a file he continually restocks with new photos. His work includes traveling with film location managers or directors scouting the state, contacting local people for assistance and facilitating during filming.

Maribeth Goodrich
Administrative Assistant



Working to enhance the resources available to production companies filming in the state, Maribeth performs a broad range of administrative

assistance and related duties. She acts as a liaison between Montana film crew members and the Film Office regarding movie projects in the state. Maribeth maintains crew and support service member files and organizes press clippings, statistics and other information for the Film Office files. In addition, Maribeth compiles all of the information for the Montana Film Production Guide.

FILM OFFICE

Suzanne Elfstrom
Location/Marketing Assistant

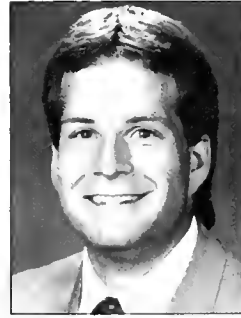


Suzanne organizes the library of thousands of photographs and videotapes and reams of other information. She also responds to requests from out-of-state companies interested in filming in Montana and prepares photo presentations to market Montana to meet their needs. She provides information to production companies on state laws and regulations relating to the motion picture industry in Montana. Suzanne also

provides site location assistance, guidance, and counsel to the many production companies inquiring about Montana.

SUPERHOST INFORMATION SERVICES

Shawn Peterson
Superhost/Information Services Manager



Getting the private sector involved in building tourism is the goal behind the Superhost program, a customer service training program. Through the program, employees at motels/hotels, campgrounds, restaurants, gas stations, retail stores, chambers and a host of others learn how to increase state visitors' lengths of stay and encourage their return. In addition the program encourages communities to develop local sources of

visitor information. Shawn directs the development and implementation of contracts with professional Superhost customer service trainers. These contractors are located throughout the state and are responsible for providing front-line customer service training. Shawn also conducts annual audits of tourism organization, receiving accommodations tax revenue and is responsible for developing information systems to disseminate Montana tourism and recreation information.

INDUSTRY SERVICES & OPERATIONS

Gail Brockbank
Industry Services Manager



Diverse responsibilities provide variety for Gail every day. She oversees the distribution of more than \$1.7 million in accommodations tax revenues to Montana's 15

tourism regions and cities. This includes assisting the organizations in applying for project funding, performing financial audits, assuring program compliance and explaining program administration to the private sector. In addition, she also serves as liaison between the certified tourism organizations and the Montana Tourism Advisory Council, coordinates the annual Governor's Conference on Tourism and Recreation, supervises the Telemarketing/Fulfillment program and manages the development and support of state-assisted visitor information centers.

David Broussard
Operations Manager



To ensure the most effective control of Travel Montana funds, David performs a wide range of budgeting, accounting and purchasing duties. David oversees the processing

and documentation of all expenditures, purchase orders and income to assure accuracy and compliance with state rules and Travel Montana policies. He prepares cost estimates and performs financial evaluations with an eye toward reducing cost and increasing effectiveness. A key part of David's job is managing Travel Montana's extensive telemarketing activities. Each year he assures that hundreds of thousands of consumer requests are handled well, and that literature packets are mailed in a timely manner.

Don Reimer
Fulfillment Coordinator



Don oversees Travel Montana's fulfillment activities, assuring that 450,000 Travel Planners and Vacation Guides, and more than a million copies of the state Highway Map

reach consumers in an accurate and timely manner. He is also responsible for seeing that Chambers of Commerce and instate businesses receive Montana travel publications. He supervises packing of all types of mailings, coordinates labels and sees that all packages are metered correctly. Don also receives and processes all incoming and outgoing division mail and maintains the travel literature inventory, verifying quantity and condition as shipments arrive from the printer.

TRAVEL COUNSELORS

Joanne Gilbert
Travel Counselor



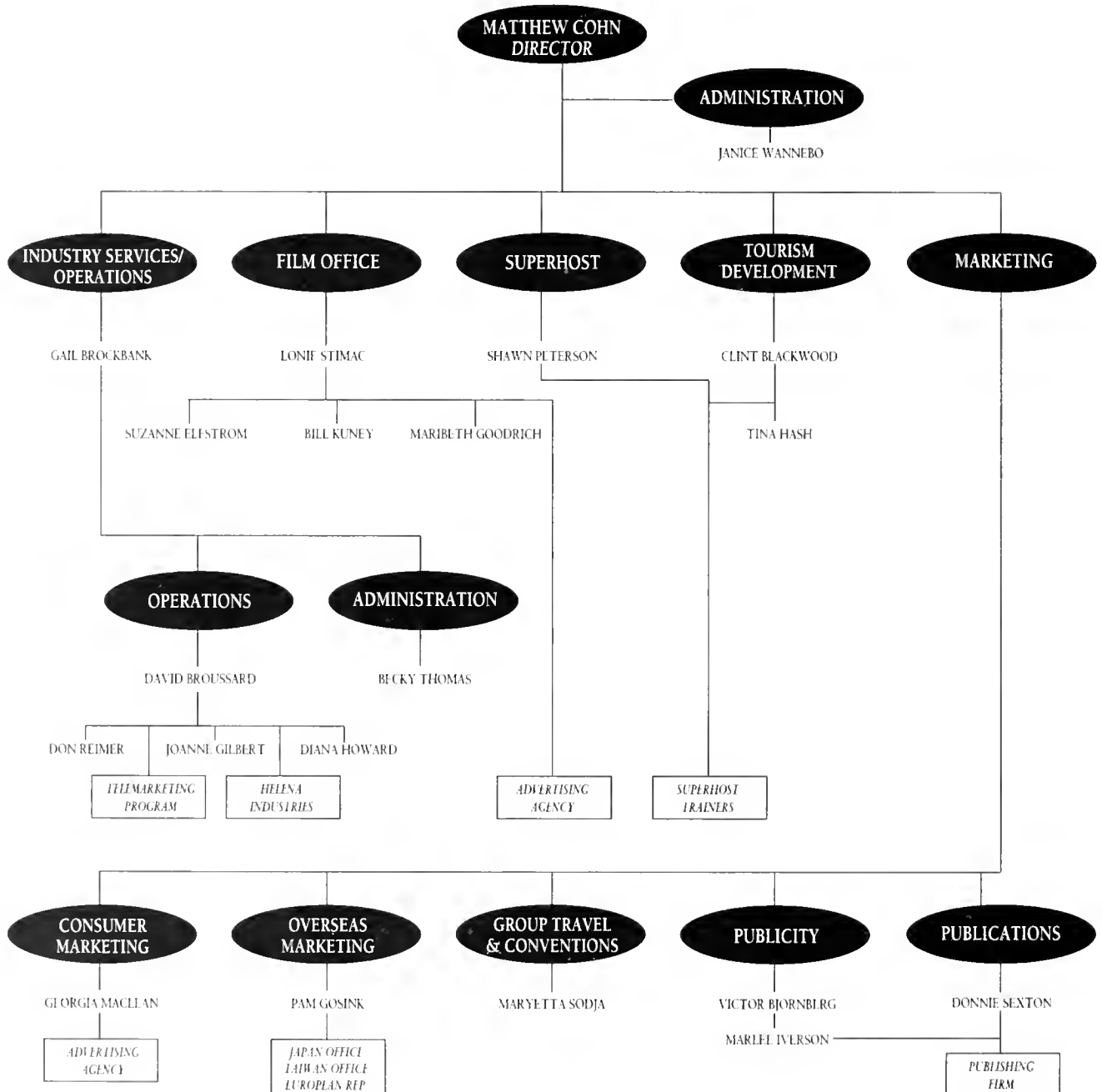
Often serving as the initial contact potential visitors have with Montana, Joanne and Diana play a vital role in creating a favorable first impression of the state. Relying on a storehouse of personal knowledge and a variety of information resources, they respond to multiple questions over the phone and provide details on events, attractions, weather, travel routes, and much more. In addition, they receive Travel Montana's business calls and mail from tour operators, film industry representatives, members of the travel industry, and others, expertly directing and distributing to the appropriate staff members. They perform data entry of written and verbal requests for travel and educational information on a daily basis, including requests from Montanans specifically asking that their out-of-state friends and relatives receive a personal letter from the Governor, along with the Montana Vacation Planning Packet, more commonly referred to as the "Invite-A-Friend" program. And, as needed,

and on a project-by-project basis they assist with administrative support duties. During the summer travel season, Diana collects and compiles visitor counts from the state's main attractions. In winter and spring, she gathers information from Montana's ski areas for ski reports that are widely distributed instate and across the nation. She is also responsible for entering, monitoring and reporting on the bulk distribution of Travel Montana's publications to businesses and organizations.

Diana Howard
Travel Counselor



TRAVEL MONTANA ORGANIZATIONAL CHART



Travel Montana's consumer marketing program is designed to position Montana's vacation opportunities in the minds of consumers, motivating them to consider Montana as a prime tourist destination. Paid advertising, including joint ventures with private-sector tourism industry partners and with other appropriate state travel offices, is the major marketing tool used to reach this goal.

All advertising is targeted toward consumers whom market research and experience have shown to be most likely to visit Montana: people who either live within a certain geographic area and fit a certain demographic profile, or have special interests that draw them to Montana, or both. Consumers who have responded to past advertising campaigns are also identified and targeted. Database marketing methods are used to capitalize on previous consumer inquiries through direct marketing campaigns. Travel Montana will continue to build on the success of its Missouri River Country project which targeted previous inquirers in adjacent states and provinces who would logically travel through eastern Montana enroute to other destinations.

The 1-800-VISIT-MT telephone number is being used in all advertising campaigns to reinforce consumer awareness of Montana and to facilitate requests for further information.

FALL MARKETING - 1994

The primary objective of this "shoulder-season" marketing effort is to extend the Montana tourism season by establishing an image of Montana as a prime fall vacation destination. Two main target audiences are:

- 1) people with a propensity to travel outside the summer season, primarily the "empty nesters" and RV travelers;
- 2) the family vacationers who tend to take more vacations of shorter duration.

TELEVISION ADVERTISING

The fall television spot created for the 1992/93 season and cloned from the award-winning "Montana Sings" summer spots is being used again and aired in the nearby markets of Fargo-Moorhead, Minot-Bismarck, Rapid City, Sioux Falls-Mitchell, Spokane, Regina and Calgary-Lethbridge in July and August 1994. The 30-second format includes versions featuring participating tourism regions as well as a generic version with Travel Montana's 800 telephone number.

MAGAZINE ADVERTISING

The two-thirds-page, four-color ad is designed to highlight those features that appeal to potential fall travelers. These will run in a variety of targeted magazines, including *Travel Holiday*, *Sunset*, *Adventure West*, *McCall's*, *New Choices* and *Backpacker* during the June/July/August time frame.

WINTER MARKETING - 1994-95

The primary goal of Travel Montana's winter advertising program is to create and enhance an image of Montana as a prime winter sports vacation destination, with uncrowded conditions, friendly people, comfortable accommodations, affordable prices and a balanced, back-to-basics skiing experience.

Primary target audiences are nonresident alpine skiers, nordic skiers and snowmobilers, ages 25-45, in the middle to upper income bracket. Older adults with children are key targets for extended ski vacations during school breaks.

DOWNHILL SKI CO-OP - 1994/95

This multifaceted marketing program is a joint venture among Travel Montana, the Montana ski areas and participating tourism regions.

Elements of the campaign include magazine advertising, regional spot and cable television and ski reports. The Invite-A-Friend This Winter program (in which Montanans request that letters of invitation and travel packets be sent to their friends by the governor) and the Montana Road Show (in which participating ski areas host promotional/educational seminars in key target markets) are also important elements of this cooperative effort.

The advertising campaign created for the 1993/94 season will be used again to reinforce the theme "Simply Better Skiing," and to emphasize family ski vacations. The existing Invite-A-Friend This Winter creative continues to promote downhill and cross-country skiing and snowmobiling.

Again this year Travel Montana will invite tourism regions and individual ski areas to buy into the downhill ski television campaign, providing them an opportunity to insert their own visuals and audio voice-over into the generic Ski Montana commercial, and to select television markets which meet their individual priorities.

Inquirers may request the option of getting additional information from Montana ski areas. A new Travel Montana marketing initiative will allow ski industry partners controlled access to these inquirer lists.

To maximize the marketing effort, advertising dollars target national ski publications such as *Ski*, *Skiing* and *Snow Country*, reaching larger, broader markets as well as the nearby markets to serve all levels of ski services offered in the state. The magazine *Ski Canada* is used to reach the important Canadian winter market.

In co-operation with the publishers of *SKI* and *Skiing* magazines, Travel Montana and individual members of the Montana Ski Areas Association will undertake a direct mail program to 25,000 subscribers in key states and provinces, identifying all 13 ski areas within the state and promoting specific ski packages.

CROSS-COUNTRY SKI ADVERTISING - 1994/95

This campaign is targeted toward cross-country skiing enthusiasts who travel in pursuit of the sport. The ad creative will be based on the existing downhill ski ad creative. Vertical publications are used in combination with a targeted publicity campaign. Inquiries are tracked by an extension number adjacent to the 1-800-VISIT MT telephone number.

SNOWMOBILING ADVERTISING - 1994/95

This campaign is targeted toward out-of-state snowmobile enthusiasts who travel in pursuit of the sport. Ad creative is based on the downhill and cross-country ad creative to heighten the overall awareness of Montana's winter vacation opportunities. Vertical publications are used in combination with a targeted publicity campaign. Inquiries are tracked by an extension number adjacent to the 1-800-VISIT MT telephone number.

SPRING & SUMMER MARKETING

The purpose of Montana's spring/summer advertising is to create and enhance an image of Montana as a prime vacation destination in both seasons, offering spectacular scenery, a pristine environment, historical and cultural attractions, premier national parks, watchable wildlife, a variety of outdoor activities for both individuals and families, and an uncrowded and relaxing environment. Additionally, the goal of the advertising creative is to convey the "Montana Mystique," the unique Montana experience.

Target audiences vary widely, from mass to highly vertical, depending upon the audience segmentation appropriate to the advertising vehicle used. Generally, spring and summer target audiences fall into two groups:

- Active adventure seekers who participate in outdoor pursuits such as fly fishing, white-water floating/rafting, backpacking, horseback riding, golfing and other outdoor activities.
- Travelers who enjoy sightseeing, including driving through spectacular scenery, visiting national parks and historical sites, and seeing other natural and commercial attractions.

MAJOR MARKET TV ADVERTISING - 1995

New ad creative with the theme "Take the Journey" is being used to produce three 30-second spots featuring a broad range of Montana scenes and reinforcing the unique nature of the Montana vacation experience.

The spots target the following established markets: Seattle, Minneapolis, Denver, Salt Lake City and San Francisco. Milwaukee, a new market tested in 1994, will also be included. Boise, Chicago and Sacramento are recommended new markets to be tested in 1995.

The campaign will consist of seven and five week flights in primary and secondary markets respectively, in the March/April timeframe, with 850 to 600 GRPs. There will be a higher percentage of cable advertising than in previous years because it allows for more efficient targeting of specific audiences.

MAGAZINE ADVERTISING - 1995

New ad creative, complementing the new "Take the Journey" television campaign, is being used to produce a series of four-color and black-and white ads to run in the appropriate magazine categories utilized by Travel Montana: travel, RV/drive, mature, adventure seeker, photographer, sportsman, historical and country life-style markets.

The state travel offices of Montana and Wyoming will continue to increase exposure and maximize advertising budgets through the Montana/Wyoming cooperative campaign featuring Glacier, Yellowstone and Grand Teton national parks.

The state travel offices of Montana, Wyoming, Idaho and Utah will continue to promote "The Best of Four Worlds" in a Heart of the Rockies advertising campaign.

Travel Montana will continue to be a highly visible partner in the Old West Trail marketing consortium with the state travel offices of North Dakota, South Dakota, Nebraska and Wyoming. In addition to consumer advertising, the five state area plans to exhibit at three consumer travel shows under the Old West Trail banner.

INVITE-A-FRIEND TO MONTANA

This year-round program encourages Montanans to invite their out-of-state friends and relatives to vacation in Montana, while reminding them of the many vacation opportunities available in the state. The campaign is promoted instate on a public service basis through the use of television, radio, newspapers, corporate mailings, and strategically placed display racks and reply coupons. Friends and relatives of participants, as well as participants themselves, receive a letter from the governor and a Montana Vacation Planning Kit.

EVALUATION MECHANISMS

Numerous mechanisms are used to measure the effectiveness of Travel Montana's advertising efforts, including image research, creative testing, conversion studies and ongoing analysis of inquiries generated through advertising. Conversion studies coordinated with the Institute for Tourism and Recreation Research (ITRR) of the University of Montana are undertaken to measure actual visitation as a result of inquiries. The studies measure the effectiveness of various advertising media, origin of travelers, visitor demographics, etc. A major ITRR media evaluation study based on spring/summer 1994 data will provide valuable information for selecting target markets and making 1995 media buys.

Travel Montana maintains complete records of all travel requests, including specifics related to the date of request, origin of inquiry and the operator who handled each request. Detailed breakdowns of telephone and written inquiries are used to evaluate the effectiveness of the specific advertising vehicle and to track cost efficiency/performance of each ad.

INSTATE MARKETING

An in-state marketing program currently under development will encourage Montana residents to travel within their own state, especially to some of Montana's less-visited areas. A multimedia public service campaign will create awareness of such travel opportunities by highlighting points of interest, history, culture and events in each of Montana's tourism regions. A secondary objective of the campaign is to influence out-of-state visitors to stay longer and to visit other parts of the state.

SPECIAL PROJECTS

In a new initiative, Travel Montana will be matching regional moneys to provide marketing assistance for tourism regions who historically have received less bed tax revenue than the norm, creating a budget of approximately \$120,000.

CONSUMER EXHIBITING

Travel Montana is represented at approximately four consumer sport or travel shows, from five to 10 days in length, each with market selection complementing magazine and/or television advertising.

Participation is expected to include:

- Sports & RV Show, Anaheim
- Northwest Sportshow, Minneapolis
- Sports, Vacation & RV Show, Phoenix
- Travel & RV Show, Toronto

This program allows staff to provide persuasive, on-site travel counseling to potential visitors to Montana. Booth and displays at each show are designed to enhance Montana's image as an attractive, accessible and affordable vacation destination, and to distribute regional and state brochures. Montana's visibility and effectiveness at these shows are heightened through staff support from the Department of Fish, Wildlife & Parks and regional representatives who provide unbiased statewide information. In 1994, in both Phoenix and Winnipeg, Travel Montana joined Wyoming, North and South Dakota, and Nebraska, to exhibit under the Old West Trail banner.

EVALUATION MECHANISMS

In alternating years, a limited number of participants are selected at random for an in-house survey. Data is gathered on visitation patterns—time of visit, return visit, length of stay, purpose of trip and influence of show staff on trip planning.

Shows are evaluated based on exhibit location, traffic flow, number of requests for travel literature, consumer interest and awareness, and demographics of the audience.

CONSUMER SERVICES

Consumer services performed by Travel Montana have a dual purpose: 1) to provide consumers with much-needed travel planning assistance, and 2) to produce and maintain accurate statistical data for the evaluation of the division's advertising efforts.

TRAVEL COUNSELING AND INQUIRY PROCESSING

Once awareness of Montana as a vacation destination has been created or the consumer has made the decision to travel in Montana, it is important to provide accurate and timely vacation planning information. In order to process approximately 450,000 requests by phone and mail annually, Travel Montana contracts with telemarketing and fulfillment businesses. In addition, miscellaneous calls are received at the Travel Montana office.

Travel Montana owns and maintains a computer system and 12 phone lines which have been installed at the telemarketing center at Montana State Prison in Deer Lodge. The telemarketing center is staffed 8 a.m. to 5 p.m., five days a week, with hours extended during specific campaigns which generate heavy inquiries. Voice mail is available at all times operators are not available.

In an effort to improve telemarketing services, the toll-free number "1-800-VISIT MT" is being used. This eliminates confusion from quickly reading a numerical number and is considerably easier to remember for later use or referral.

Travel Montana sets the program guidelines and procedures and monitors all aspects of the operation. Each year, Travel Montana revises, updates and standardizes training manuals and procedures and coordinates policies between Travel Montana staff, operators at Montana State Prison and state/community visitor information centers. This information is available to interested chambers and other entities as well.

All travel counselors at both sites are expected to accurately and quickly enter names of inquirers and be knowledgeable of travel amenities which are available statewide. At the same time operators recognize their role as customer service specialists and respond to specific questions as needed.

INQUIRY FULFILLMENT

Once phone and mail requests are entered by operators, labels or Invite-A-Friend letters are produced and mailed within three working days. Standard packets are sorted for bulk mailing, packaged and mailed by students of a training program for the developmentally disabled. Requests that require extra material or special handling are prepared at the Travel Montana site.

In addition to nonresident inquiry fulfillment, Travel Montana undertakes a spring bulk distribution of the major travel publications to instate sites most frequented by travelers. The spring distribution is completed under a contract awarded through a bid process and is designed to reduce the costs of bulk requests throughout the year. Weekly bulk requests are also processed and shipped.

Computer and labeling equipment will be evaluated annually, and replaced as necessary and allowable by budget, to provide greater accuracy, speed and cost savings in processing both bulk and individual requests. Up-to-date programming enhances the data captured for the use of evaluation of consumer advertising.

CONSUMER PUBLICATIONS

Publications play an important part in the vacation planning process of travelers, as often a potential visitor makes the choice between Montana or another vacation destination. Travel Montana guides are consumer driven in an effort to provide accurate, reader-friendly information in an easy-to-use format. The guides are designed to reflect the spirit of Travel Montana's advertising campaigns. A goal for 1995 will be to use recycled paper on all publications.

1994-95 MONTANA WINTER GUIDE

In an effort to provide Montana's winter visitor one guide with detailed information on our many winter activities, snowmobiling information is now included with the existing winter guide. This 52-page, four-color publication will feature specific information about downhill and Nordic resorts, details on Montana's groomed snowmobile trail systems, a winter calendar of events, winter safety tips, and a directory featuring over 80 businesses offering services, such as lodging, snowmobile rentals, etc. Major airlines with service to Montana, as well as the BLM, Forest Service and Department of Fish, Wildlife & Parks are partners in this effort. (Print 130,000, available August 1994.)

1994-95 MONTANA VACATION GUIDE

A 48-page, four-color, glossy magazine that conveys high-quality images of Montana, organizing the information by region to include history, attractions and activities that help route visitors through the state. The publication includes images and information on wildlife and state parks, as well as a pull-out highway map. (Print 625,000, available January 1995.)

1994-95 MONTANA TRAVEL PLANNER

This 130-plus page guide is divided into six sections, each featuring one of Montana's tourism countries. Within each country there is comprehensive information on the following: motels/hotels, bed and breakfasts, guest ranches, resorts, hostels, hot springs and public and private campgrounds. Also included with each country are details on recreational opportunities, such as golf courses, ski areas, state parks and national forests. The travel planner also features a section on general information resources such as car rentals, weather and road reports, local chamber contacts, and airline information. (Print 600,000-625,000; available January 1995)

1994-95 MONTANA HIGHWAY MAP

A large four-color piece folded to 6" x 9" which provides travelers with a detailed map and mileage chart on one side and vacation information, organized by tourism regions, on the back side. (Print 1,000,000; available year-round)

MONTANA CALENDAR OF EVENTS

A two-fold, one-color brochure which details Montana's main tourism-oriented events and celebrations.

1994-95 Winter Calendar

(October-March)

(Print 180,000; available August 1994).

1995 Summer Calendar

(April-September)

(Print 380,000; available February 1995).

1995 MONTANA FISHING GUIDE

As a cost-savings measure, this guide will see major revisions. The guide will no longer be an image piece. Detailed maps and charts of fish species found in various Montana waters will continue to be the emphasis of this publication. Pertinent information on fly-fishing, catch-and-release, etc. will be included. The two-color guide will be produced in cooperation with the Department of Fish, Wildlife & Parks. Print 100,000; available spring 1995.

MONTANA INDIAN RESERVATIONS BROCHURE

This three-fold, 12"x18", four-color brochure serves as a visitors' guide to the seven Indian reservations and 11 tribes in Montana. The brochure includes a brief description of each reservation, along with a calendar of events. Print 150,000; currently available.

MONTANA FACTS SHEET

This two-fold, one-color 9" x 16" brochure is designed as an educational piece. This continuously updated sheet is used to provide Montana facts to libraries, schools and children.

U. S. A N D C A N A D I A N P U B L I C I T Y

Publicity is one of the most believable and effective types of exposure a travel destination can get. Travel Montana utilizes an aggressive plan to generate editorial exposure in national magazines, television shows, and regional and local publications. Key travel and news media, both broadcast and print, will be targeted for editorial coverage of Montana in 1994/95.

PUBLICITY CAMPAIGNS

Publicity campaigns are coordinated efforts to promote a Montana event, attraction or season to the national and international media. Following the policy set forth in the Montana Tourism Industry's and Travel Montana's Five-Year Strategic plans, the publicity office will focus its efforts on highlighting travel opportunities in Montana's less traveled areas and seasons while continuing to coordinate campaigns with all the state's tourism regions and CVBs. In addition, publicity efforts will work closely with the Consumer Advertising program to tie Travel Montana's publicity efforts into the market focus of its advertising campaigns.

WRITER FAMILIARIZATION TRIPS

Writer familiarization ("fam") trips are hosted trips to the state of Montana for carefully selected writers who are on assignment to gather story information. Travel Montana encourages the regional tourism organizations to participate in writer "fam" projects. Travel Montana selects appropriate publications, makes the contacts and provides assistance in developing itineraries. The "fam" is then hosted by the regional organization.

PUBLICITY ASSISTANCE

Once interest is generated among writers and editors, Travel Montana works with the state's travel and tourism industry to offer assistance with airfares, lodging, guides, meals and the transportation needed for the media to complete their Montana travel story development and production. Travel Montana also serves as an information resource for travel writers and others reporting on Montana. It offers the media access to color slides, black-and-white photos and stock video footage. These types of publicity assistance were provided to over 100 publications and broadcast outlets in 1993, resulting in over \$2.5 million worth of publicity for Montana.

VIDEO PRODUCTION AND DISTRIBUTION

Travel Montana offers consumers and the media four video productions and a video footage library highlighting Montana's statewide travel opportunities. The productions include a half-hour program called "Montana: America's Natural Park," two 15-minute versions of this program—one focusing on the summer season and the other the winter—and a 9 1/2 minute video entitled "Nature's Song." Each video is provided at cost to consumers upon request or free to media interested in airing the programs in full or using portions to produce programs on travel in Montana. The publicity office will work with its media partners to expand the images in the video footage library and make it more useful to Montana's travel promoters.

VIDEO NEWS RELEASES

Video News Releases (VNRs) are two- to three-minute news segments which are pre-produced and then distributed by satellite and tape to television news departments across the country. A typical VNR is seen by approximately five to 15 million households. Travel Montana will use VNRs as appropriate for travel stories of national interest or to counteract negative publicity regarding travel opportunities in Montana.

QUARTERLY NEWSLETTER

Untold Story Leads from Montana is mailed quarterly to approximately 700 editors, travel writers and broadcast producers in the U.S. and Canada. The newsletter offers brief, factual story ideas and provides a quarterly reminder to the media that Montana has a wide range of subjects to cover.

CALENDAR OF EVENTS

Media calendars of events listing dates, contact people and a short description of each event are distributed to writers, editors and producers in seasonal press kits and on an as-needed basis. These calendars differ from the ones produced for distribution to consumers because of the special needs of the media, such as longer lead time and greater descriptive detail.

KEEPING IN TOUCH

Regular mailings provide continued contact with important media, allowing them to update their background information files, spark new story ideas and keep Travel Montana's media lists current. These mailings will include two press kits consisting of Montana Vacation, Travel Planner and Winter guides along with

the six-month *Calendar of Events* and the seasonal *Untold Story Leads from Montana*. Two other mailings will include the seasonal *Untold Story Leads from Montana* and appropriate communications or press trip invitations. Additional information will be provided as needed.

MONTANA TRAVEL UPDATE

This monthly newsletter is designed to keep Travel Montana's partners and supporters informed of issues, activities, events and developments important to Montana's tourism industry. *Montana Travel Update* offers a quick briefing on tourism issues, outlooks, research, success stories, challenges and upcoming Travel Montana events and activities.

OLD WEST TRAIL CO-OP

As a member of the Old West Trail states' tourism development organization, Montana is working with Nebraska, North and South Dakota, and Wyoming to promote increased publicity for the region. This marketing strategy includes public relations campaigns utilizing print and electronic media as well as production of themed publications.

EVALUATION MECHANISMS

Each year, research is done to estimate the dollar value of publicity generated as a result of these programs. Each publicity item is "valued" as the cost for a similar amount of advertising space in the same medium. In calculating comparable publicity amounts, Travel Montana focuses only on publicity it has had a role in developing.

OVERSEAS MARKETING

Travel Montana aggressively promotes Montana as a destination to the international travel trade, with emphasis on the United Kingdom, Germany, France, Japan and Taiwan. The program involves working with key tour operators, wholesalers and travel agencies to establish new Montana itineraries for groups and FITs (individuals), while assisting Montana businesses in their marketing efforts overseas.

This is accomplished by representation at key international travel trade shows, familiarization tours, cooperative advertising ventures with other states in the region, brochure and video distribution and ongoing personal contact with targeted tour operators, wholesalers and travel agents.

WESTERN EUROPE

The European marketing program includes use of the services of specialized travel representatives, on a contractual basis, in cooperation with the states of Wyoming, South Dakota and Idaho. Primary markets are the United Kingdom and Germany, with France to be added in January 1995.

Under the Rocky Mountain International banner of "The Real America," Montana continues to see tremendous success from collective marketing efforts. The four states will participate jointly in World Travel Market (London), International Tourism Exchange (Berlin), and Swiss Visit USA (Switzerland).

Familiarization tours for trade and media representatives, as well as trade missions, are also important components of the Rocky Mountain International program.

PACIFIC RIM

Trade office representatives in Kumamoto, Japan and Taipei, Taiwan market Montana's travel-related products and services to the travel trade in their respective countries under close direction from Travel Montana. Their responsibilities include contact with wholesalers, tour operators and travel agents to create demand for Montana's travel-related products and services. This objective is achieved through distribution of travel materials, organization of familiarization trips, translation of Montana literature, travel trade show participation and sales calls.

Most major Japanese and Taiwanese tour companies have offices on the West Coast. Sales calls will be made to those offices twice a year. In addition, Montana will participate with the states of Idaho, Washington and Oregon in the USTTA—VISIT USA travel trade shows in Seoul, Korea; Osaka and Tokyo, Japan in November/December 1994.

EUROPEAN SALES & TRAINING SEMINARS

In lieu of the annual trade mission, the RMI states of Montana, South Dakota, Wyoming and Idaho will conduct trade and travel agent training seminars in Germany and the United Kingdom in 1995. Each state representative and the RMI European directors will present seminars in Frankfurt, Munich and Hamburg, Germany in November 1994 and in London, Edinburgh and Manchester in the United Kingdom in March 1995. The Rocky Mountain Round-Up will be repeated in September 1995.

TRADE SHOWS

Visibility at the key international travel trade shows allows Montana to make contact with wholesalers and operators, and provides the opportunity to follow-up on new and existing projects and ideas. Travel Montana delegates are sometimes joined by private-sector participants. In addition to those that are previously noted, shows scheduled for 1994/95 are Huddle West (Las Vegas), Pow Wow USA (New York) and Active America Travel Summit (San Francisco).

OVERSEAS MARKETING WORKSHOP

To assist Montana businesses interested in becoming involved in overseas marketing or increasing their share of overseas visitors, another in-depth seminar will be presented at the Governor's Conference on Tourism, April 10-11, 1995. The main emphasis will be on how to most effectively sell Montana, work with the overseas travel market and successfully host international visitors. The workshop will count on participation by experts in the field from state, regional and national levels.

FAMILIARIZATION TOURS

With the assistance of Montana travel industry members, "fam" tours will be conducted to provide firsthand knowledge for prospective tour operators. By experiencing Montana, operators can better understand the mechanics of designing new itineraries in the state. "Fam" tours will also be held for carefully selected travel journalists, with the intended result of generating positive travel articles in foreign publications with specific emphasis on central and eastern Montana and the winter season.

OTHER PROMOTIONAL ACTIVITIES

Following the unprecedented success of the recent "City Slickers" promotion in the United Kingdom and Japan, Montana will continue to pursue development of similar opportunities. By developing promotional partnerships with the distributors of American films and videos that feature the types of vacation and recreational opportunities found in the region, consumer awareness of the state's destination potential is increased.

A "River Wild" promotion is planned for Europe in early 1995.

Promotional activities will also include the distribution of promotional publications and videos, in foreign languages when possible; and the development of other innovative promotional projects.

DIRECT MAIL CAMPAIGN

This specialized direct mail program will provide current tour planning material to tour operators, as well as follow-up to contacts initiated during trade shows. This program also establishes and maintains a professional rapport with overseas group and FIT travel planners. In addition, *Montana Magazine* is mailed throughout the year to selected international tour operators who also receive *The Montana Calendar* each year.

EVALUATION MECHANISMS

Montana's visibility in overseas markets is measured by tracking the number of Montana tourism itineraries which have been added or expanded by international operators/wholesalers; tour extracts provided by RMI; the interest level of consumers and trade representatives in overseas target markets and by monitoring changes in travel expenditures of overseas visits (USTTA and IFTRR).

U. S. A N D C A N A D I A N G R O U P T R A V E L

Montana's domestic group tour program is designed to promote Montana's many group tour and travel opportunities by marketing directly to group tour operators throughout the United States and Canada. Montana is promoted as a tour destination, as well as a viable stopover on tour itineraries. The program promotes all seasons in Montana and encompasses activities from sightseeing to river rafting to skiing.

FAMILIARIZATION TOURS

Familiarization tours will be conducted to provide personal, firsthand site inspections for prospective group tour operators and ski leaders. By experiencing Montana, tour operators can better understand the mechanics of designing new itineraries in Montana.

KEEPING IN TOUCH

This specialized direct mail program will provide current tour planning material, as well as establish and maintain a professional rapport with group travel planners throughout the United States and Canada.

CALENDAR

One-hundred-twenty-five selected group tour operators will receive *The Montana Calendar*. Featuring many aspects of the state, the calendar will communicate a positive image of Montana as a scenic tour destination.

MONTANA MAGAZINE

This bimonthly magazine will be sent to 120 targeted group tour operators. With new tour attractions featured in each issue, this direct mail effort is designed to inform and educate group tour operators.

TRAVEL TRADE EVENTS

By attending select travel shows and conventions, contacts can be made with prospective group tour operators and new and expanded Montana itineraries can be discussed and promoted. Selected tour operator consumer shows will also be attended by Travel Montana to enhance and support sales of existing Montana tours packaged by qualified tour operators.

NATIONAL TOUR ASSOCIATION (NTA)

Travel Montana will attend both the annual marketplace and convention in Dallas in November of 1994 and the Spring Exchange in Reno in April of 1995. Two Travel Montana representatives will attend the fall marketplace and one will attend the spring meeting.

AMERICAN BUS ASSOCIATION (ABA)

One representative from Travel Montana will attend the annual marketplace and convention, scheduled for early December in Fort Lauderdale.

ONTARIO MOTORCOACH ASSOCIATION (OMCA)

One representative from Travel Montana will attend the annual marketplace and convention in Toronto, Ontario in November of 1994.

SALES BLITZES

Personal sales calls will be made to selected group tour operators. This effort will assist in the development of new and expanded Montana tour programs, as well as establish and maintain Montana's presence in key markets. These sales calls will be timed, wherever possible, in conjunction with Travel Montana media advertising and/or participation at consumer and trade shows.

CANADIAN SALES MISSION

The foundation of the mission will be a prearranged schedule of travel industry appointments tentatively scheduled in Alberta, British Columbia and Saskatchewan. The mission will include sales calls, seminars and promotional functions for targeted travel industry representatives.

GROUP TRAVEL WORKSHOP

This seminar/workshop is planned for members of the Montana travel industry who are interested in working with the group travel industry. The seminar will focus on effective techniques for development of group tours.

ADVERTISING & MARKETING

Specific projects will be undertaken to heighten consumer awareness of Montana, as well as awareness of group tour operators in the United States and Canada. Planned projects include timely insertions in travel trade publications and cooperative advertising projects with the private sector.

COURIER MAGAZINE

A trade magazine of the National Tour Association, this publication is distributed free of charge to some 500 NTA group tour operator members and to approximately 3,000 tour supplier members. This will be a cooperatively funded project with the tourism industry of Montana.

DESTINATIONS MAGAZINE

Similar to *Courier*, *Destinations* magazine is a travel trade publication distributed to both group tour operators and tour suppliers. This project will also be a cooperatively funded effort with the tourism industry of Montana.

PROMOTIONAL POSTERS

Travel Montana will work to increase consumer awareness through distribution of promotional posters. Distribution channels will include travel agencies, group tour offices and conventions and meetings.

IMAGE BROCHURES/TOUR SHELLS

Creating and distributing image brochures will be an additional method used by Travel Montana to help tour operators increase consumer awareness of their Montana itineraries. Distribution channels will be the same as those used for the promotional posters. Distribution of tour shells will help operators sell specific Montana itineraries.

PRESS RELEASES

Travel Montana will prepare and distribute several press releases over the course of the year to keep Montana visible in travel trade publications.

GROUP TOUR PLANNING GUIDE

The Montana Group Tour Planning Guide is designed to be an "all-in-one" tour planning reference. With listings of attractions, events, hotels and restaurants, the guide encompasses the points of interest for the tour planner designing a Montana itinerary.

EVALUATION MECHANISMS

The number of group tours traveling in and through Montana is tracked by permits issued by the Montana Department of Highways and by research conducted by the Institute for Tourism and Recreation Research

ITRR . Additionally, group travel promotional efforts are evaluated through personal contacts and meetings with key tour operators at national conventions.

MEETINGS AND CONVENTIONS

Montana is fast becoming a key destination consideration for convention and meeting planners nationwide. To further strengthen Montana's image among these decision makers, Travel Montana is continuing to expand its convention marketing efforts.

A comprehensive program for the promotion of meetings and conventions has been designed in cooperation with the Convention & Visitors Bureaus, and with input from the Montana Innkeepers Association.

The goals of Travel Montana for this expanded marketing program are twofold: 1) Build and maintain a positive image with prospective meeting and convention planners; 2) Generate and distribute leads to the CVBs for them to distribute to the appropriate convention facilities in their area.

ADVERTISING CAMPAIGN

In order to further increase awareness of Montana as a desirable location for meetings, conventions and seminars, Travel Montana will undertake a magazine advertising campaign for 1994/95. This campaign will be in cooperation with the Convention & Visitors Bureaus in the state.

TARGET AUDIENCE

This campaign will specifically target individuals who influence or make decisions about the location of meetings, seminars and/or conventions for associations, corporations and other organizations.

MEDIA STRATEGY

The selection of the media is based on those publications with high readership among the various target audiences, and/or which have a specific regional or editorial focus that relates well to Montana's position as a meeting location. In addition, publications with bonus distribution during related convention/trade shows are included.

FULFILLMENT

All inquiries from the advertisements will be fulfilled with a *Montana Meeting Planner's Guide*. Those leads will then be distributed on a regular basis to the participating Convention & Visitors Bureaus.

TRADE SHOWS

Trade shows provide an avenue to meet one on one with the key decision makers in the industry. Travel Montana will attend up to four shows in FY/95. Shows currently under consideration include Western Conference of Association Executives (WCAE), Meeting Planner's International (MPI), American Society of Association Executives (ASAE), Affordable Meetings, Meetings World and Incentive Travel and Meeting Executives (ITME). Whenever possible, Travel Montana will share booth space with interested CVBs.

MEETING PLANNER'S GUIDE

The Montana Meeting Planner's Guide is a complete resource for meeting planners—from cozy three-person retreats to large scale conventions. This full-color guide also includes essential information on related services, such as transportation and meeting coordinators.

DIRECT MAIL CAMPAIGN

The direct mail campaign will be a two-tiered campaign with the first mailing a four-color image piece, produced and distributed by Travel Montana to approximately 10,000 targeted meeting planners nationwide. This piece will be a self-mailer and will include a bind-in reply card allowing recipients to request additional information.

The second mailing will be a fulfillment piece for the first mailing and will include a letter of invitation from the governor along with the Montana Meeting Planner's Guide. Travel Montana will then send these leads to the Convention Visitors Bureaus on a regular basis.

PRESS RELEASES

Travel Montana will prepare and distribute several press releases over the course of the year to keep Montana visible in appropriate trade publications.

SALES CALLS

No special sales trips are planned solely for the purpose of calling on convention and meeting planners; however, calls will be made on meeting planners as much as possible in combination with other trips already planned by Travel Montana.

INVITE-A-CONVENTION

This campaign is promoted instate through letters from the governor to state employees, Montana corporations, agencies and associations. The letter is aimed at encouraging employees of those organizations to bid conventions when they travel or attend conferences. Additionally, the program encourages them to contact Travel Montana for a "Convention Kit," containing tips on bidding and planning a convention, as well as a *Meeting Planner's Guide* listing convention and meeting facilities statewide.

Another aspect of this campaign is a letter from the governor, along with a Vacation Planning Kit, encouraging association members to attend conventions scheduled to take place in Montana and inviting potential participants to extend their stays in Montana in conjunction with their conventions.

EVALUATION MECHANISMS

Travel Montana tracks the number of inquiries received from the advertising campaign as a measurement of the level of interest in Montana as a convention destination. Distribution of all Invite-A-Convention packets, meeting planners guide and direct mail reply cards will be tracked as well.

INDUSTRY SERVICES

With the increasing awareness and popularity of Montana as a travel destination, it is necessary to assure that travelers are serviced in a manner that makes them want to return again and to speak highly of their Montana vacation experience to friends and relatives.

Travel Montana's industry services are also aimed at supporting nonprofit tourism organizations in marketing efforts. In addition, private-sector businesses participate in programs designed to increase business, including marketing seminars and opportunities to network with tourism entities.

DISBURSEMENT OF FUNDS TO CERTIFIED TOURISM ORGANIZATIONS

The Lodging Tax Law specifies that approximately 25 percent of the accommodations tax proceeds to the Department of Commerce will be returned on a prorated basis to six tourism regions and nine qualifying cities (as shown on page 5) for their promotion as a travel destination or movie filming location.

Typical projects undertaken by these tourism organizations include brochures, travel guides, television advertising, full-color and directory print ads, publicity campaigns, convention marketing and consumer and trade show exhibiting. Travel Montana's responsibilities include:

- Review of each project proposal to ensure compliance with Tourism Advisory Council (TAC) guidelines and the law.
- Presentation of regional/CVB marketing plans and projects to Tourism Advisory Council for approval. (Assistance in development is available for tourism organizations from Travel Montana if desired.)
- Annual audits of tourism organizations.
- Refinement of compliance procedures to provide a more streamlined process, yet still meet all legal and guideline requirements.
- Brainstorming/educational session of approximately two hours in conjunction with Tourism Advisory Council meetings.

VISITOR INFORMATION CENTERS

In cooperation with communities, Travel Montana is providing visitor information centers at five sites in the state. The five operational sites are Culbertson, Dillon, Hardin, West Yellowstone and Wibaux with two other sites—St. Regis and Shelby—in early stages of development. All sites were identified in a study presented to the 1991 Legislature.

Travel Montana has a contractual agreement with a nonprofit organization in each community to provide an outdoor kiosk, computer and data base, office furniture, Made in Montana furniture, TV/VCR, brochures, training and \$13,000 annually to assist with staffing. Communities provide the building, its maintenance, and additional staffing and volunteers if needed.

In the spring, Travel Montana offers visitor information center training which is open to all entities providing visitor information.

GOVERNOR'S CONFERENCE ON TOURISM & RECREATION

The focus and purpose of the annual Governor's Conference on Tourism and Recreation is to build industry awareness; provide marketing tips, research results and hands-on workshops; present national and state travel trends; as well as to provide a format for networking and input regarding the direction of tourism in Montana.

The annual travel conference is a self-sustaining project, supported by registration fees of attendees and numerous sponsors. Following each conference, attendees have the opportunity to return an evaluation form. Information gathered from this form is incorporated into future planning to accommodate the needs and interests of attendees.

The 1995 conference will be held in Helena on April 10 and 11 during the Legislative session.

▼ SUPERHOST PROGRAM

In the long term, Travel Montana's success will be judged not only by the number of guests who visit the state, but also by the quality of their stays and the number of times they return. Montana has an outstanding reputation for friendly people, and is fortunate to have a comprehensive customer service training/visitor information program in place.

SUPERHOST PROGRAM

The Superhost program is designed to create an awareness and understanding of Montana's travel industry and to enhance the level of customer service provided by the industry. Ultimately, the program strives to encourage the state's visitors to stay longer, tell their friends about positive experiences, and to return to the state time after time. The Superhost program stands ready to lead the way in educating Montana communities and businesses about the importance and economic impact of Montana's tourism industry.

Superhost workshops are three to four hours in length, and cover a wide selection of travel and customer service topics. They are designed to develop a commitment to quality service and to broaden each participant's knowledge of Montana's tourism industry. All Superhost workshops contain a common core of information, but were developed to be flexible in order to meet the needs of individual businesses and communities. The workshops are designed to involve participants in an interactive learning experience as opposed to a lecture type atmosphere. As a result, each workshop is slightly different depending on the facilitator's style, the background and experiences of participants and the needs of the business/organization.

CONTRACTED TRAINERS

Travel Montana contracts with professional trainers who conduct customer service workshops throughout Montana. These trainers help to make cost-effective customer service training readily available in every community in Montana, regardless of size. The trainers are responsible for marketing the program to communities and businesses within their designated regions.

SUPERHOST COMMUNITIES

Montana currently has 32 certified Superhost communities. In order to become a Superhost community, local groups or organizations must develop and initiate a plan to provide ongoing customer service training, provide staffing for a local visitor center and develop tourism materials that list events, attractions and visitor services available in the area.

SUPERHOST BUSINESSES

In order to become a "Superhost Business" a majority of a business' current staff needs to have participated in a Superhost workshop within the previous 24 months. Certified businesses receive a Superhost window/door sign. Information highlighting the importance of the Certified Business program is included in at least one Travel Montana publication.

SUPERHOST IN THE SCHOOLS

A pilot project to get customer service and tourism awareness information into the Montana school system will be initiated during 1995. This project will be a cost sharing effort between travel Montana, contracted trainers, local communities and a number of high schools. The goal of the pilot project is to expose approximately 1,500 high school students to modified Superhost workshop. Training will be conducted by Travel Montana's contracted Superhost trainers.

TOURISM AWARENESS CAMPAIGN

Tourism is Montana's second largest and fastest growing industry. In order to educate Montanans about the important role tourism plays in the state's economy, Travel Montana will develop a public awareness campaign designed to highlight the importance of tourism and customer service. The campaign will include direct mail and public service announcements for radio and print.

VISITOR INFORMATION RESOURCES

The Superhost *Quick Reference Guide* will be updated to reflect changes since its first printing in 1991. This guide was developed for employees and volunteers who are frequently asked for Montana travel information. Other resources will be developed in printed or computer format to improve visitor information.

MONTANA INTERACTIVE TRAVEL INFORMATION SYSTEM

In order to improve the level of tourism and recreation information available to visitors and Montana residents, the Montana Tourism and Recreation Initiative (MTRI) has identified the development of an interactive information system as a high priority. Travel Montana will coordinate this effort with the belief that providing guests with more information about Montana's tourism and recreation opportunities will encourage them to stay longer and, thus, provide a greater economic impact to Montana.

The Montana Interactive Travel Information System (MITIS) will be a state-of-the-art interactive travel information system accessible to visitors traveling in and through Montana. The system will feature multimedia computers with touch screens, and will incorporate text, pictures, video and sound. Participating MTRI state and federal agencies will include travel and recreation information in the system that is of interest to the traveler in Montana. These interactive computers will eventually be placed in visitor centers operated by MTRI agencies including the seven centers operated with the support of Travel Montana, Chambers of Commerce and other Montana tourism-related businesses will also have the opportunity to purchase the information systems.



TOURISM DEVELOPMENT AND EDUCATION

As Montana continues to develop and market its tourism and recreation potential, coordination of efforts within the Montana tourism industry becomes increasingly important. The main emphasis of this area is to coordinate and facilitate cooperative tourism-related efforts between federal and state agencies and private-sector interests. This will be achieved in accordance with the Montana tourism industry's Five-Year Strategic Plan and Travel Montana's corresponding Five-Year Marketing Plan.

Following the direction highlighted in the Five-Year Strategic Plan, Travel Montana will enhance its community outreach efforts. The two main areas of focus will be rural tourism assessment and development and tourism-related education. Both of these programs will be closely coordinated with various other state and federal agencies and the Montana State University Extension Program.

INTERAGENCY COORDINATION

Extensive cooperative partnerships will be further cultivated among appropriate state and federal agencies through the newly formed Montana Tourism & Recreation Initiative (MTRI). Participating state agencies include the departments of Commerce; Transportation; Fish, Wildlife & Parks; Natural Resources & Conservation; Montana Historical Society and the University Extension Service. Federal participants include the National Park Service, Bureau of Land Management, Army Corps of Engineers, Fish and Wildlife Service and the USDA Forest Service. Travel Montana will schedule and facilitate meetings. Specific project coordination will be shared among MTRI members:

- Establishment of interactive travel information computer kiosks.
- Coordination of printed promotional literature.
- Facilitation of community tourism assessment and development.
- Development of interagency planning and research processes.

Additionally, Travel Montana will work closely with state and federal agencies and private-sector interests on such issues as the development of programs to enhance Scenic Byways and Watchable Wildlife. Initial review and planning will be conducted to assess the feasibility of developing a statewide Lewis & Clark Trail corridor.

INDIAN TOURISM DEVELOPMENT & PROMOTION

Travel Montana will continue to work closely with Montana's American Indians on issues of tourism planning, marketing and promotion through the Indian Tourism Working Group. Travel Montana, in partnership with the Montana Coordinator of Indian Affairs Office, will expand efforts in working with each Montana Indian tribe at their individual levels of interest and development while striving to network tourism opportunities statewide among tribes as appropriate. A focused coordination program with tribal colleges on Montana Indian Reservations will facilitate the expansion of needed tourism and recreation education for Montana's Native Americans.

STRATEGIC TOURISM PLAN AND MARKETING PLAN REVIEW AND UPDATE

Now two years into both the Five-Year Strategic Tourism Plan and Five-Year Marketing Plan, it is timely to review and document progress made and to reaffirm work yet to be accomplished. Specifically, both plans will be reviewed to summarize the actions thus far implemented that are ensuring the achievement of key goals and objectives identified as being within Travel Montana's overall mandate. This review and update process in FY '95 will be completed "in house;" no consultant services will be hired. A more in-depth plan review for the Five-Year Strategic Tourism Plan will be developed in FY '96.

FUNDING PROCUREMENT

Travel Montana will continue to explore opportunities available to secure "non-traditional" funding sources to compliment the existing accommodations tax revenues. Funding alternatives such as federal grants, corporate grants, and sponsorships and private foundations will be researched and appropriate applications submitted.

RURAL TOURISM ASSESSMENT & DEVELOPMENT

To assist the many rural communities of Montana considering tourism as an economic stimulus, Travel Montana will continue to coordinate and facilitate the implementation of a community tourism assessment and development program. In an on-going partnership with the Montana State University Extension Program, technical expertise will be drawn from numerous public-sector agencies, as well as private-sector consultants. This program is designed to be primarily "self-administering." With overall direction given by Travel Montana and the Montana State University Program, participating communities will commit to investing the manpower and time necessary to complete the various program steps. In FY 95 (the program's second year) work will continue in three communities. A comprehensive, user-friendly "how to" workbook is being drafted to assist in the process implementation in future communities.

Included in this comprehensive process is the building of a community profile to include: lifestyle, attitudes toward tourism, current community economic structure, existing asset inventories and long-range community vision. Having identified and prioritized potential tourism projects acceptable to the community, review studies will be administered to gauge a potential project's social, economic and environmental impacts, both positive and negative. Community leadership, project development, marketing and follow-up are all components of the program.

EDUCATION

In close coordination with the Montana State University Extension Program, the Small Business Administration and various other public-sector agencies offering training and education, Travel Montana will provide coordination and partnership funding to present expanded education opportunities for the private sector of the Montana travel industry. Tourism training courses planned for FY 95 include farm and ranch vacations, museums, feasibility analysis for potential facilities, financing and business planning. Travel Montana will coordinate the planning and implementation of these course offerings in partnership with participating agencies. In addition, Travel Montana will continue to offer technical expertise in such areas as customer service training and tourism publicity, as well as overseas group travel and consumer marketing.

FILM INDUSTRY PROMOTION AND SERVICES

Travel Montana, through the Film Office, promotes the state as a location for feature films, commercials, television, documentaries, music videos and still photography, and provides information, scouting and support services to the motion picture industry—including producers, directors, location managers and studio executives.

ADVERTISING & MARKETING

Specific promotional projects are undertaken by Travel Montana to build and sustain the production community's awareness of the state as a prime filming location.

TRADE MAGAZINE ADVERTISING

Montana ads will be featured in several trade publications such as *AFCI Locations*, *Daily Variety* and *Hollywood Reporter*.

PHOTO ESSAY BROCHURE

This four-color brochure is distributed as an addendum to the Montana Production Guide. It is also used for separate distribution at trade shows.

PROMOTIONAL POSTER

One poster will be produced to continue the current series on dramatic Montana locations. It will be distributed at trade shows and as a limited direct mail piece.

CALENDARS

A targeted mailing of Montana calendars featuring Montana locations will be sent to selected producers, directors, studio executives and location managers. These calendars will provide a monthly reminder of the state as a location. November 1994.

SCOUTING INDUSTRY LIAISON

Scouting trips showing producers and other studio personnel possible locations for their upcoming projects are carried out by Travel Montana. When appropriate, Travel Montana works with its industry and regional liaisons to help facilitate this process.

TRADE SHOWS & FILM FESTIVALS

Being represented at major industry trade shows and film festivals in the United States and abroad allows Montana the opportunity to increase awareness and knowledge of the state as a film location on a one-to-one basis.

SUNDANCE FILM FESTIVAL

A nationally recognized film festival held in Park City, Utah, where directors, producers and studio executives meet and conduct workshops and screen new independent feature films and documentaries. January 1995.

LOS ANGELES LOCATION EXPO

An annual motion picture location show attracting up to 6,000 major decision makers in both U.S. and foreign markets. This show is sponsored by the Association of Film Commissioners International. March 1995.

SHOWBIZ EXPO WEST

One of the premier trade shows for the motion picture industry, this annual trade show attracts over 30,000 attendees in three days. June 1995.

FULFILLMENT

Travel Montana responds to requests from producers for information about locations as well as the guidelines, laws and permits regarding shooting in Montana. Turnaround time for information will range from one to 24 hours.

MONTANA PRODUCTION GUIDE

The *Montana Production Guide* is distributed to key decision makers within the motion picture industry. It is an all-encompassing reference for shooting a production in Montana. The 160-plus page guide details the following information: production services and crews; contacts for federal, state, and city agencies; weather data; aircraft charter; and major towns and cities, along with photos of Montana locations. Approximately 2,500 guides are produced every two years.

PHOTO AND INFORMATION FILES

Responding to inquiries quickly is one of the best ways to ensure that Montana is considered for a project. Travel Montana keeps thousands of photographs on hand to send at a moment's notice and continually updates files by photographing both old and new locations as appropriate.

EVALUATION MECHANISMS

Travel Montana tracks location inquiries and requests as a measurement of the level of interest in the state. The true measure of success, however, is the increasing amount of revenue generated in Montana through motion picture and commercial projects. Production company expenditures are calculated from data collected by the film office from personal interviews and a mailed questionnaire sent at the completion of the project.

These figures are then presented in aggregate on an annual basis. Additionally, there are long-term results – building the image of Montana as both a viable location and tourist destination—which are difficult to quantify, but provide a return in the future.

COOPERATIVE MARKETING

Travel Montana regularly seeks involvement in cooperative marketing programs, both with other states and provinces and with private-sector organizations/businesses. Such efforts enhance the appeal of Montana's vacation product and stretch marketing funds for Travel Montana and its co-op partners. Following is a brief overview of some existing ventures.

PRIVATE SECTOR CO-OPS

Travel Montana undertakes several efforts open to participation from tourism organizations/businesses. Programs include a downhill ski co-op with participation in television and Winter Guide advertising, advertising in various trade and consumer publications, placement of "advertorial" in magazines targeting group tour operators and organization of journalist familiarization trips in cooperation with Montana's six tourism regions.

OLD WEST TRAIL ASSOCIATION

Travel Montana is a longtime partner in the Trail, along with the states of Wyoming, North Dakota, South Dakota and Nebraska. The organization is dedicated to increasing tourism and tourism revenue in the five-state region through combined publicity efforts. As a result, Montana receives high-quality regional and national exposure.

MONTANA-WYOMING NATIONAL PARKS CO-OP

This longtime advertising partnership includes the states of Montana and Wyoming, TW Services, Glacier Park International and the Grand Teton Lodge Company (concessionaires at Yellowstone, Glacier and Grand Teton national parks, respectively). The co-op's annual spring magazine campaign featuring Glacier, Yellowstone and Grand Teton national parks is one of the most effective inquiry-generators of all Travel Montana's programs.

TRAIL OF THE GREAT BEAR

Travel Montana will continue to support the marketing and promotion of this international scenic corridor linking Banff National Park in Canada to Yellowstone National Park in the United States. In addition to including the Trail of the Great Bear in the overall consumer marketing and group travel programs, Travel Montana will be a member of both the Trail of the Great Bear Society's Advisory Board and Marketing Committee.

RMI—"THE REAL AMERICA"

Montana has seen considerable success in attracting visitors from Germany and the U.K. through the partnership with Idaho, South Dakota and Wyoming under the Rocky Mountain International (RMI) banner. This program has proven to be extremely cost effective and has won national awards and recognition for its creative approach to marketing this corner of the world in Europe. Significant cost savings are achieved by working together with the other states in reaching the European travel market.

HEART OF THE ROCKIES

Travel Montana will continue to be an active member of this four-state tourism promotion cooperative (Montana, Wyoming, Utah and Idaho). Marketing resources are pooled to achieve optimum impact in consumer advertising, brochure production/distribution, and media exposure. A three-year Tourism Development Study submitted by the Heart of the Rockies for co-funding by the Economic Development Administration will focus on the identified needs of Montana and Wyoming for a database inventory of attractions and services.

TRAVEL MONTANA MARKETING CALENDAR 1994

	1994/JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Consumer Advertising	<ul style="list-style-type: none"> • Fall TV Ads-Regina, Spokane, Calgary, Lethbridge, North Dakota, South Dakota • Fall magazine Ads 	<ul style="list-style-type: none"> • Fall TV Ads-Regina, Spokane, Calgary, Lethbridge North Dakota, South Dakota • Fall Magazine Ads 	<ul style="list-style-type: none"> • Ski Montana Magazine Ads • Ski Montana Direct Mail 	<ul style="list-style-type: none"> • Ski Montana Magazine Ads • Cross-Country Ski Magazine Ads • Snowmobile Magazine Ads • Invite-A-Friend This Winter • Ski Montana Roadshows-North Dakota, Alberta, Saskatchewan 	<ul style="list-style-type: none"> • Cross-Country Ski Magazine Ads • Snowmobile Magazine Ads • Ski Montana TV Ads-Canada, North Dakota, Idaho, Washington, Minnesota • Invite-A-Friend This Winter 	<ul style="list-style-type: none"> • Invite-A-Friend This Winter • Snowmobile Magazine Ad
Trade Advertising & Promotions	<ul style="list-style-type: none"> • Tour Operator Direct Mail-Montana Magazine 	<ul style="list-style-type: none"> • Media Direct Mail-Winter Calendar of Events • Convention Ads 	<ul style="list-style-type: none"> • Convention Ads • Publicity Newsletter Direct Mail-Winter • Press Kit Direct Mail-Winter • Tour Operator Direct Mail-Montana Magazine 		<ul style="list-style-type: none"> • Film Office Direct Mail-Calendar • Group Travel Direct Mail-Calendar • Tour Operator Direct Mail-Montana magazine 	<ul style="list-style-type: none"> • Publicity Newsletter Direct Mail-Spring • Destinations Magazine Ad • Convention Ads
Familiarization Tours	<ul style="list-style-type: none"> • Montana Historical Society Foundation Ghost Town Tour-Gold West Country (22-26) • Karl Teusche-German Journalist (15-18) • Tom Oregon/German TV Crew Fam (28-Aug. 5) 	<ul style="list-style-type: none"> • Russell Country Hi Line Culture and History Media Tour (5-10) 	<ul style="list-style-type: none"> • U.S. Tour Operators Fam-Montana 			
Tourism Events & Projects				<ul style="list-style-type: none"> • Tourism Advisory Council Meeting, Havre (3-4) • National Customer Service Week (3-7) • Indian Tourism Working Group Meeting 		
Sales & Trade Missions		<ul style="list-style-type: none"> • American Society of Association Executives (ASAE)-San Francisco (28-31) 	<ul style="list-style-type: none"> • Cineposium (24-26) • Affordable Meetings-Washington, D.C. (6-9) • Incentive Travel & Meeting Executives (IT&ME)-Chicago (26-30) 	<ul style="list-style-type: none"> • Ontario Motorcoach Association (OMCA) Marketplace-Toronto (18-21) • National Tour Assoc. (NTA) Fall Exchange-Dallas (29-Nov. 5) 	<ul style="list-style-type: none"> • World Travel Market-London (13-19) • German Training Seminars-Frankfurt, Munich, Hamburg (18-25) • USTTA-VISIT USA Travel/Trade Shows-Seoul, Korea, Osaka/Tokyo, Japan (28-Dec. 11) • Meetings West-San Francisco (29-Dec. 2) 	<ul style="list-style-type: none"> • American Bus Association (ABA) Marketplace-Fort Lauderdale (3-9)
Consumer Travel Shows						
Publications	<ul style="list-style-type: none"> • Quick Reference Guide • Montana Travel Update 	<ul style="list-style-type: none"> • Winter Guide • Winter Calendar of Events • Montana Travel Update • Hospitality Times Newsletter (1st edition) 	<ul style="list-style-type: none"> • Montana Travel Update • Untold Story Leads-Winter 	<ul style="list-style-type: none"> • Montana Travel Update • Hospitality Times Newsletter 	<ul style="list-style-type: none"> • Montana Travel Update 	<ul style="list-style-type: none"> • Montana Travel Update • Montana Production Guide

TRAVEL MONTANA MARKETING CALENDAR 1995

1995/JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
<ul style="list-style-type: none"> • Spring/Summer Magazine Ads • Ski Montana TV Ads Canada, North Dakota, South Dakota, Idaho, Washington, Minnesota • Invite-A-Friend This Winter • Montana/Wyoming Co-op Ads. 	<ul style="list-style-type: none"> • Spring/Summer Magazine Ads 	<ul style="list-style-type: none"> • Spring/Summer Magazine Ads • Summer TV Ads- Washington, Colorado, Minnesota, Utah, San Francisco, Portland, Milwaukee, Phoenix, National Cable • Invite-A-Friend This Summer • Montana/Wyoming Co-op Ads 	<ul style="list-style-type: none"> • Invite-A-Friend This Summer • Spring/Summer Magazine Ads • Summer TV Ads-Washington, Colorado, Minnesota, Utah, San Francisco, Portland, Milwaukee, Phoenix, National Cable • Montana/Wyoming Co-op Ads 	<ul style="list-style-type: none"> • Instate Campaign • Fall Magazine Ads • Montana/Wyoming Co-op Ads 	<ul style="list-style-type: none"> • Fall Magazine Ads • Instate Campaign
<ul style="list-style-type: none"> • Film Office Ads • Media Direct Mail- Summer Calendar of Events • Tour Operator Direct Mail-Montana Magazine • Convention Ads 	<ul style="list-style-type: none"> • Film Office Ads • Courier Magazine Ad 	<ul style="list-style-type: none"> • Film Office Ads • Press kit Direct Mail- Summer • Publicity Newsletter Direct Mail-Summer • Tour Operator Direct Mail-Montana Magazine 	<ul style="list-style-type: none"> • Film Office Ads 	<ul style="list-style-type: none"> • Film Office Ads • Tour Operator Direct Mail- Montana Magazine 	<ul style="list-style-type: none"> • Film Office Ads • Fall TV, Newsletter Direct Mail- Fall • Convention Ads
<ul style="list-style-type: none"> • European Winter Farm Tour (2-14) 	<ul style="list-style-type: none"> • U.S. Ski Group Leaders Ski Fam- Northwest Airlines 	<ul style="list-style-type: none"> • European Alpine Winter Tour (22-Apr 1) 			<ul style="list-style-type: none"> • European Adventure Farm Tour (10-20)
<ul style="list-style-type: none"> • Farm & Ranch Tourism Workshops-Russell Missouri River, Custer Glacier, Gold West and Yellowstone countries 	<ul style="list-style-type: none"> • Indian Tourism Working Group Meeting (tent.) • Tourism Advisory Council Meeting (6-7) 		<ul style="list-style-type: none"> • Tourism Customer Service Public Awareness Campaign • Visitor Information Center Training (24-25) • Governor's Conference on Tourism & Recreation-Helena (10-11) 	<ul style="list-style-type: none"> • Tourism Customer Service Public Awareness Campaign 	<ul style="list-style-type: none"> • Tourism Advisory Council Meeting (5-6) • Indian Tourism Working Group Meeting (tent.)
<ul style="list-style-type: none"> • Sundance Film Festival-Park City, UT • Huddle West-Las Vegas (16-18) • Religious Conference Management Assoc. (RCMA)-San Antonio (31-Feb. 3) 	<ul style="list-style-type: none"> • Swiss Visit USA • Active America Travel Summit-San Francisco (16-17) • Japanese West Coast Tour Wholesalers' Sales Calls (20-24) 	<ul style="list-style-type: none"> • Canadian Sales Mission • Location Expo-Burbank, CA • ITB-Berlin (4-8) • UK Training Seminars-London, Edinburgh, Manchester (9-15) 	<ul style="list-style-type: none"> • National Tour Association (NTA) Spring Exchange-Reno (5-8) • Japanese& Taiwanese West Coast Tour Wholesaler sales calls 	<ul style="list-style-type: none"> • Pow Wow USA-New York (20-25) 	<ul style="list-style-type: none"> • Showbiz Expo West • Meeting Planner's International (MPI)-Chicago (24-28)
<ul style="list-style-type: none"> • Anaheim Sports Vacation & RV Show (OWT) (7-15) 	<ul style="list-style-type: none"> • Phoenix Sports Vacation & RV Show (OWT) (2-5) 	<ul style="list-style-type: none"> • Northwest Sports & Vacation Show (OWT) (24-Apr 1) • Travel Trade Show (OWT) (3-5) 			
<ul style="list-style-type: none"> • Montana Travel Update • Vacation Guide • Travel Planner • Guide to Indian Reservations Brochure • Highway Map • Hospitality Times Newsletter • Untold Story Leads-Spring 	<ul style="list-style-type: none"> • Montana Travel Update • Summer Calendar of Events 	<ul style="list-style-type: none"> • Montana Travel Update 	<ul style="list-style-type: none"> • Montana Travel Update • Hospitality Times Newsletter • Untold Story Leads-Summer 	<ul style="list-style-type: none"> • Montana Travel Update • Fishing Guide 	<ul style="list-style-type: none"> • Montana Travel Update • Untold Story Leads-Fall

PLANNED RESEARCH PROJECTS

The overall purpose of the University Travel Research Program, funded by the accommodations tax, is to allow Montana's tourism and recreation industry to make informed decisions about planning, development, management, marketing and economic impact. The Institute for Tourism and Recreation Research at the University of Montana administers the program. The University Travel Research Program is designed to be relevant, practical, timely and responsive to the needs of the industry as a whole. Listed below are the research projects currently approved by the Governor's Tourism Advisory Council and funded by the University Travel Research Program.

PLANNED RESEARCH PROJECTS

MONITOR NONRESIDENT TRAVEL

A fundamental role of the University Travel Research Program is to determine the level and characteristics of tourism activity in Montana. Because of their broad applicability to marketing and business development plans, visitor numbers, characteristics, and expenditure levels are the most requested information produced by the Institute for Tourism and Recreation Research (ITRR). The objective of this project is to continue monitoring visitor numbers and expenditure levels at the statewide level.

MONITOR RESIDENTS ATTITUDES TOWARD TOURISM

Resident attitudes toward tourism influence the long-term stability and acceptability of the travel industry. In addition, resident attitudes can indicate areas of possible concern in the development of tourism opportunities which may be mitigated. This project will continue monitoring the attitudes of Montana residents toward tourism. Statewide data will be analyzed for evidence of long-term trends.

COMMUNITY TOURISM ASSESSMENT PROCESS

With this research project, ITRR will continue refining a tourism assessment process designed to be implemented in local Montana communities. Efforts will be focused on improving local estimates of economic impacts from tourism.

TOURISM AND LOCAL QUALITY-OF-LIFE

Many community level changes, both positive and negative, are attributed to tourism. Yet, while levels of tourism and community quality-of-life characteristics may change together, it is difficult to determine conclusively if one causes the other. The main goal of this project is to review existing data on community quality-of-life characteristics and levels of tourism and begin testing causative links between tourism and local quality-of-life.

SPRING/SUMMER ADVERTISING CAMPAIGN EVALUATION

Much of the accommodations tax revenue in Montana supports travel promotion. It is prudent to periodically assess the effectiveness of advertising campaigns so that revenues are spent wisely. In this project, ITRR will evaluate the spring/summer advertising campaign by determining conversion rates and comparing different media and markets.

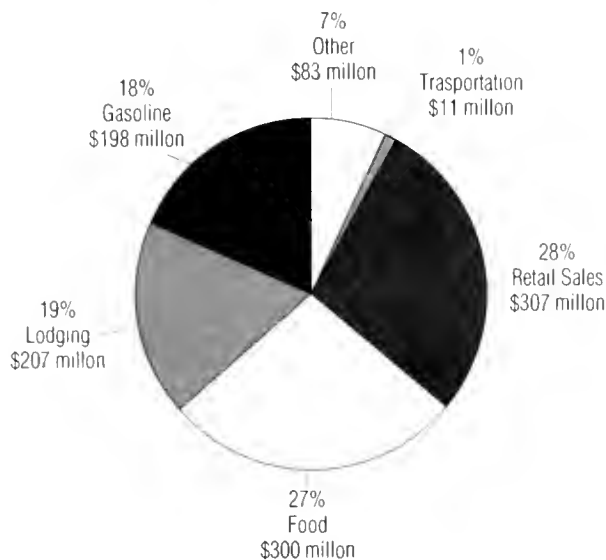
ECONOMIC IMPACTS OF SNOWMOBILING

The goal of this research is to determine the economic impact of snowmobiling (both resident and nonresident) in Montana. This research is being conducted by the Bureau of Business and Economic Research at The University of Montana.

THE IMPORTANCE OF TOURISM

Tourism is one of Montana's most important and promising industries. In fact, travel industry growth over the last decade has outpaced all other natural resource-based basic industries in Montana. It continues to enjoy steady growth. From 1991 to 1993, the number of nonresident visitors to the state increased by 10%, from 6.77 million to 7.45 million visitors. In 1993, those 7.45 million visitors spent an estimated \$1.1 billion in Montana.

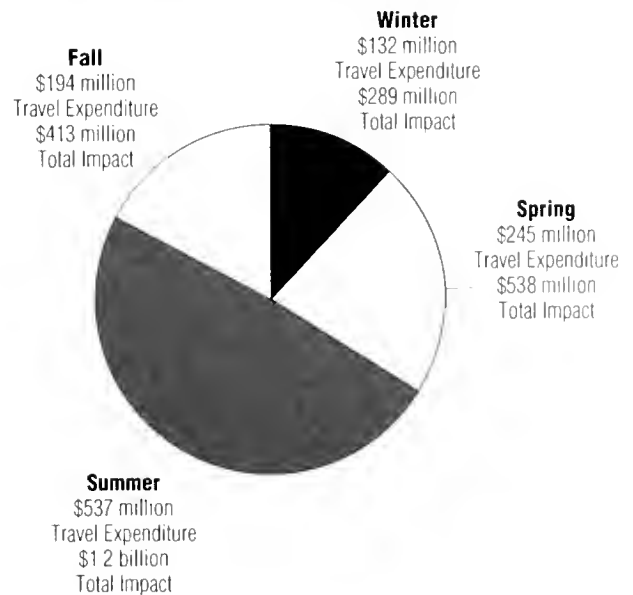
HOW THE NONRESIDENT TRAVEL DOLLAR IS SPENT



* TOTAL GROSS EXPENDITURES \$1.1 BILLION

† 1993 Figures

TRAVEL EXPENDITURES AND TOTAL ECONOMIC IMPACT GENERATED BY SEASON



† 1993 Figures

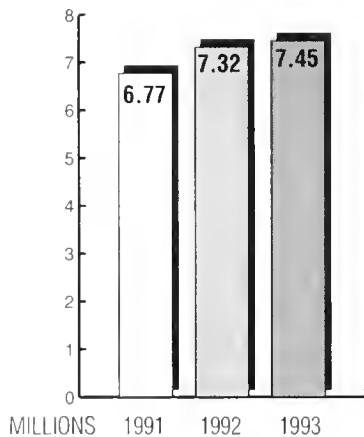
As shown above, visitor expenditures have impacts far broader than the lodging industry, and circulate through a broad cross-section of the Montana economy. *Total economic impact of the travel, tourism and recreation industry to Montana in 1993 (including indirect and induced effects) is estimated at \$2.4 billion.*

In direct benefit to all Montana citizens, visitors to Montana pay many millions of dollars annually into our general and highway funds through various Montana taxes. Nonresident travel expenditures in the state also sustained an estimated 61,000 jobs in Montana in 1993 which were directly or indirectly related to travel. In total, these jobs accounted for \$743 million in payroll, including an estimated \$37 million contribution to the general fund in the form of income taxes.

These measurements represent significant growth since 1991. Visitor expenditures have risen 13%, travel-related or dependent jobs increased by 10% and labor income from tourism has grown by 16%.

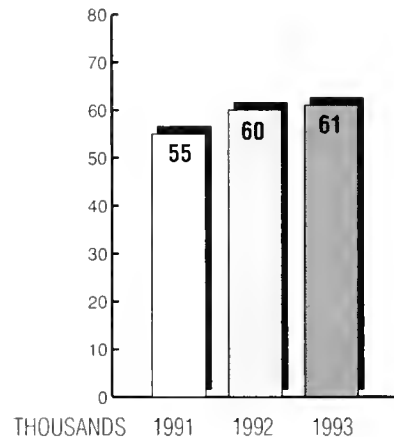
In addition, the filming of movies and commercials in Montana generated income to Montana of \$20 million in 1993, up 308% from 1992.

NONRESIDENT VISITORS Up 10%



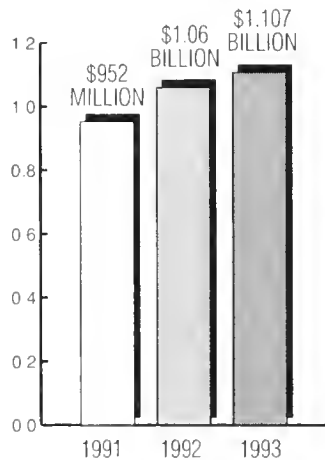
7.45 million people visited Montana in 1993, spending an estimated \$1.1 billion in our state.

TRAVEL-DEPENDENT JOBS Up 10%



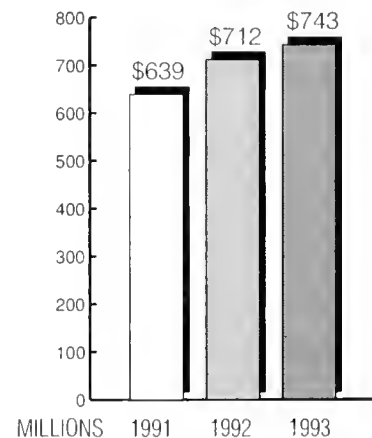
61,000 jobs in Montana are directly or indirectly related to the travel trade-in hotels, restaurants, gas stations, retail stores, and more.

VISITOR EXPENDITURES Up 13%



An estimated 5% of visitor expenditures in Montana contribute to our general and highway funds in the form of various Montana taxes.

TRAVEL PAYROLL Up 16%



Montana workers earned \$743 million in 1993 from jobs related to nonresident travel, contributing an estimated \$37 million in income taxes to the general fund.

NONRESIDENT TRAVEL'S ECONOMIC IMPACT

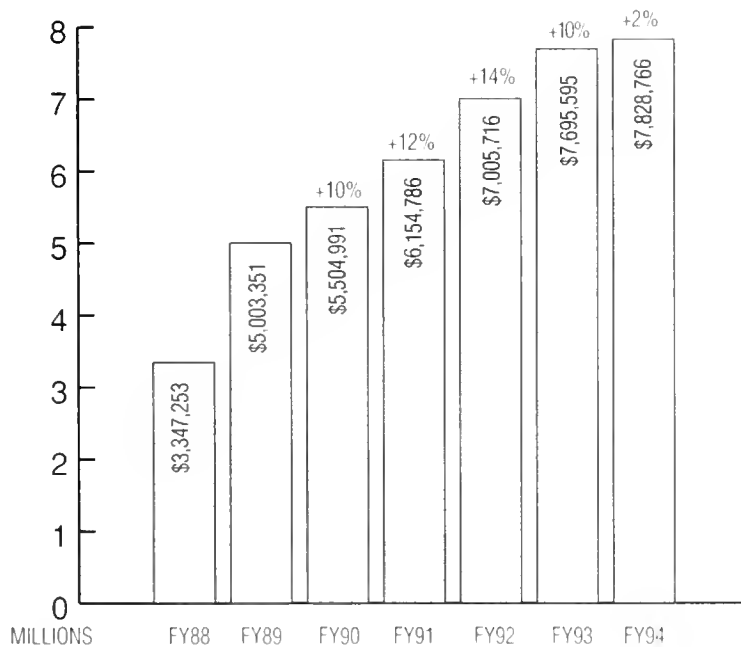
ECONOMIC IMPACT (1993)

	DIRECT IMPACT	SECONDARY IMPACT	TOTAL ECONOMIC IMPACT
TOTAL INDUSTRIAL OUTPUT	\$1.1 BILLION	\$1.4 BILLION	2.4 BILLION
EMPLOYMENT COMPENSATION (Travel-generated salary and wages)	\$345 MILLION	\$398 MILLION	\$743 MILLION
EMPLOYMENT	32,000 JOBS	29,000 JOBS	61,000 JOBS

NUMBER OF NONRESIDENT VISITORS (1993)

TRAVELER TYPE	TRAVELER GROUPS	NUMBER OF TRAVELERS
HIGHWAY	2,995,000	7,168,000
AIRPORT	178,000	288,000
TOTAL	3,173,000	7,456,000

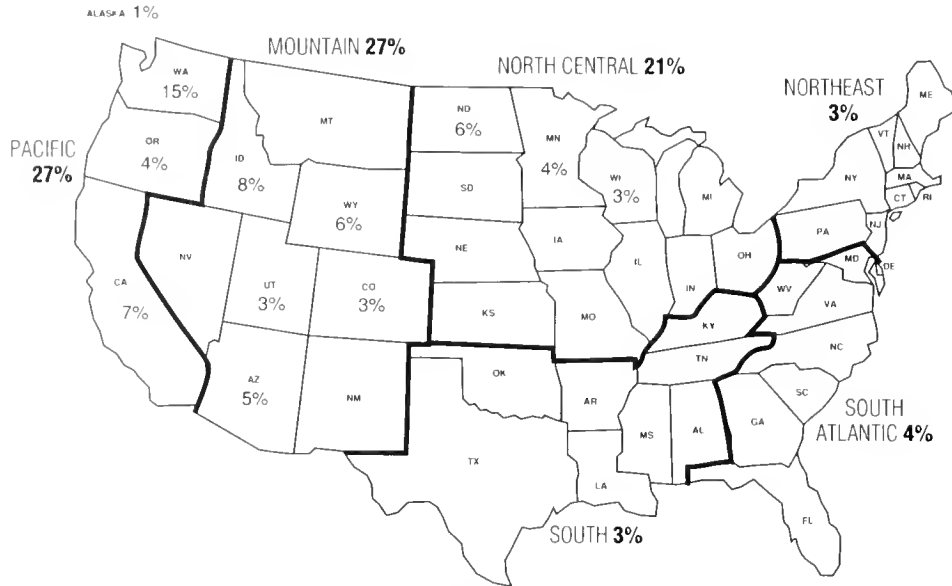
ACCOMMODATIONS TAX COLLECTIONS



* FY88 reflects only three quarters of revenue collections.

FACTS ABOUT VISITORS

Most highway travelers were from the surrounding states and provinces while air travelers came from a larger geographical area. Most nonresident highway visitors to Montana came from Washington state while most air travelers came from California. The second greatest number of air travelers came from Washington while Alberta and Idaho tied for the second greatest number of highway travelers.



STATES WITH 3% OR MORE VISITATION INDICATED ON MAP
Totals may not add to 100% due to rounding

CANADA	16%
Alberta	9%
B C	3%
Other Provinces	4%
OTHER COUNTRIES	2%

State or Province of Residence

Residence*	Highway Travelers	Air Travels
Washington	15%	10%
Alberta	9%	*
Idaho	9%	*
North Dakota	7%	*
California	6%	19%
Wyoming	6%	*
Minnesota	4%	*
Oregon	4%	3%
British Columbia	3%	*
Colorado	3%	7%
Utah	3%	4%
Texas	*	5%
Arizona	*	5%
Alaska	*	3%
Wisconsin	*	3%
Florida	*	3%
All Others	31%	38%

(*Only states and provinces greater than or equal to 3% are listed)

Nonresident highway travelers most often participated in driving for pleasure, looking for and viewing wildlife, and visiting Yellowstone National Park. Air travelers responded that visiting family and friends, driving for pleasure, and looking for and viewing wildlife were the three most common activities participated in while in Montana. Activities related to the natural environment such as nature photography and visiting national forests and parks were very common activities for both types of travel groups.

Activity Participation

ACTIVITIES*	HIGHWAY TRAVELERS	AIR TRAVELERS
Driving for Pleasure	46%	42%
Looking for, Viewing Wildlife	41%	38%
Visiting Yellowstone N P.	25%	14%
Nature Photography	25%	23%
Visiting Family and Friends	22%	44%
Historic/Interpretive Sites	20%	16%
Visiting Glacier N P.	16%	11%
Museums	15%	15%
Picnicking	15%	8%
Camping in a Developed Area	15%	1%
Visiting a National Forest	14%	12%
Day Hiking	13%	15%
Recreational Shopping	8%	13%
Visiting State Park	8%	7%
Visiting Other National Parks	8%	5%
Traveling Historic Trails	8%	6%

Columns do not add to 100% because of multiple responses.

* Only more popular activities are listed

KEY MARKETING OBJECTIVES

Seven marketing objectives have been set to guide the work of Travel Montana through a strategic planning process completed in the fall of 1992. These objectives fall into four basic categories:

- Economic Benefits & Opportunities for Montanans
- Diversifying the Industry
- Resource Protection
- Tourism Industry Cooperation

The marketing objectives which have shaped Travel Montana's program are:

- Increase visitor expenditures in Montana an average of 5% per year, with emphasis on raising per-visit expenditures and length of stay.
- Increase overall labor income : travel payroll : from the tourism and recreation industry an average of 3%–5% per year.
- Increase instate expenditures generated from motion picture and commercial productions filmed in Montana.
- Raise labor income : travel payroll : derived from the tourism industry during the fall, spring and winter seasons.
- Increase labor income derived from the tourism industry in less-traveled areas of the state.
- Support tourism development and growth which enhances Montana's natural, historical and cultural resources, and mitigates negative impact.
- Foster cooperation in tourism promotion and development through all sectors of the tourism industry.

TRAVEL MONTANA MISSION STATEMENT

*Travel Montana's mission is to
strengthen Montana's economy
through the promotion of the state
as a vacation destination and film location.*

*By maximizing the combined talents
and abilities of its staff, and
with guidance from the
Governor's Tourism Advisory Council,
Travel Montana strives to promote
a quality experience to visitors
while encouraging preservation of
Montana's environment
and quality of life.*

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